SPROTT
SCHOOL OF BUSINESS

CARLETON UNIVERSITY

BUSI 3704 A: THE ENVIRONMENT OF INTERNATIONAL BUSINESS

International Business Environment: A Brief Guideline on the Case Method, Analysis and Reporting

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INTERNATIONAL BUSINESS ENVIRONMENT:

A BRIEF GUIDELINE ON THE CASE METHOD, ANALYSIS AND REPORTING

1.0 Introduction

This set of guidelines on case study analysis and reporting pertaining to the international business environment is offered to assist the student in undertaking the individual case study assignment required in the course. It is brief in nature and as such does not purport to cover every angle or aspect the student may require knowing. It is also offered, as will be explained later, to minimize the confusion that some students may experience in this course (especially those who are familiar with case analysis in other business courses such as marketing or strategic management, etc.).

The guidelines are organized as follows. In the next section we discuss (albeit briefly) what the case method generally entails followed by a discussion of the benefits and limitations of the case approach in the third section. The fourth section describes the case studies contained in the textbook for this course and how they may be approached. Section Five outlines the assignment's deliverables and expectations followed in Section Six by a brief outline of the necessary steps in conducting a fruitful case analysis. Section Seven provides a suggested structure of the written case analysis report. Section Eight concludes this guide.

2.0 The Case Method: What is it?

In international business, case studies have been used to investigate a variety of topics including international market entry/exit processes, international mergers and acquisitions, joint ventures/consortia, international business negotiations, TNC/MNC headquarterssubsidiary relationships, consumer behavior, etc. In this course, we focus on cases pertaining to the multiple levels of the environment of international business.

In contrast to the lecture format (whereby students passively learn about concepts, theories and practices), the case method provides the student with a hands-on opportunity to use/apply concepts, theories and practices through the analysis of “real” life situations involving business conditions and management decision-making. In other words, the case method is an “applied” approach that facilitates a “learning by doing” experience as opposed to merely listening, reading, absorbing, memorizing, and regurgitating material covered in a course. As such, the case method has several benefits. Inarguably, it has its limitations/shortcomings too. We briefly look at some of the benefits and limitations below.

3.0 The Case Method: Warts and All

We have chosen in this course to combine the lecture format with the case analysis assignment because the case method has a number of benefits that may especially enhance the student’s comprehension of the contemporary environment of international business as well as strengthen the student’s analytical and communication skills. To be sure, there are limitations to this approach as well. It is therefore crucial that one recognizes/appreciates both the strengths/benefits and limitations of the case method. Let’s begin with the benefits.

3.1 Benefits of the Case Method

Primarily, the case method/approach provides the student the opportunity to develop, hone/sharpen and test one’s skills at:

(a) Assessing current/given international business conditions and predicting/forecasting/anticipating future situations by thinking clearly, logically, critically and imaginatively about complex, ambiguous, unstructured situations using incomplete information.

(b) Examining, analyzing and understanding international business (environmental/contextual) situations/conditions with which the student may not have had first-hand experience.

(c) Sorting out and organizing information by recognizing what information is important (and what is not) and what is missing.

(d) Asking the right questions and embarking to answer those questions with a clear mindset.

(e) Identifying, defining and framing opportune, inopportune and challenging conditions inherent in a given environment and/or delineating the strengths and weaknesses of the focal organization(s).

(f) Interpreting data through the use of appropriate qualitative and/or quantitative methodologies, including, tools/techniques, methods and procedures of evaluating and forecasting environmental conditions.

(g) Effective communication (relaying information, listening and persuasion) through written and oral presentations.

(h) Group/team skills and interpersonal work relations (i.e., when case studies are undertaken in groups).

(i) Experiential learning especially bringing about the awareness of constraints/parameters in real world decision making.

(j) Re-enforcing theoretical learning by applying concepts and theories to “real” life situations.

3.2 Is there a Case Against the Case Method?

Like any other pedagogical approach, the case method has its own shortcomings. First, cases may be overtaken by events such that if not adequately revised they may be rendered useless. Secondly, even though case writers endeavour to provide the same information that may have been available to decision makers at the time decisions were made, they may for a variety of reasons not always disclose all relevant information about the case. For instance, they may not do so because they sometimes may have missed pertinent data or they may not have had access to the missing data (as not all information is publicly accessible). Moreover, even when case writers may have been privy to confidential information they may sometimes not be able to use it because the companies being studied may not allow them to disclose it especially given that companies are loathe to reveal pertinent (proprietary) data for fear of the competition or simply to keep past mistakes under wraps.

In sum, the case study method does have its limitations but on balance the benefits outweigh the shortcomings.

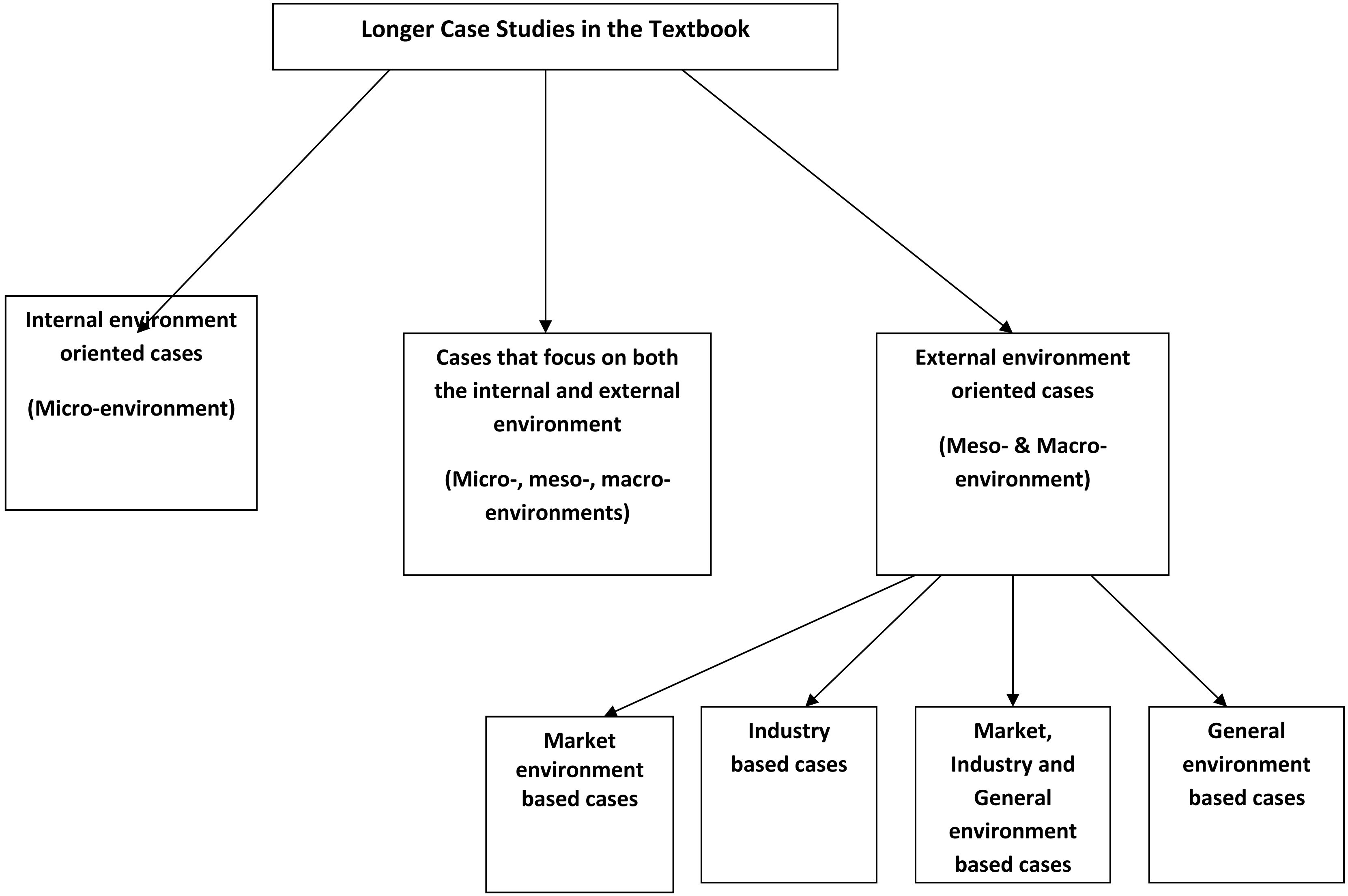
4.0 Case Studies in this Course

The case studies examined in this course are all drawn from the course textbook: **Hamilton, L. and P. Webster (2018)** ***The International Business Environment, 4th*****, Ed., Oxford, Oxford University Press** (hereafter referred to as Hamilton & Webster)**.**

The textbook has two types of case studies. Longer case studies at the beginning and end of each chapter that contextualize key ideas and explore real-life examples from the business world and mini-case studies that illustrate theories and concepts discussed in each respective chapter.

The individual assignment for this course will pertain to the longer type of case studies; i.e., those found at the beginning and end of each chapter. Typically, and depending on the subject matter of each chapter, these cases present a variety of organizational (internal) and/or market/industry and macro-societal (external) conditions/circumstances facing organizations involved (or plan to be involved) in international business. Cases focusing/pertaining to the internal environment (micro-environment) cover information regarding the organization's goals and objectives, organizational structure, its financial condition, core competences and capacities, the attitudes and beliefs of managers and employees, etc. etc. Essentially, these cases cover the strengths and weaknesses of the focal organization – indicating what the firm can or cannot do; what competences it can leverage and/or what internal shortcomings it needs to remedy/address in order to succeed. Some cases may focus on more than one organization (e.g., M&As). Nonetheless, these cases are still considered to pertain to the analysis of the micro-environment. On the other hand, external environment oriented cases, may focus on the general environment, the market/competitive environment, or the industry environment. These cases tend to either present the opportunities and threats/challenges inherent in the (general/industry/market) environment and/or the pressures that are fostering/portending changes in the given environment. Cases in this category may also pertain to how one segment within a layer affects another. Lastly, the textbook does also contain cases that focus on both the external and internal environments. In short, the cases in the textbook -- as shown in the figure below -- can be divided into three broad types, namely, those that focus on: (a) the internal environment of organizations (micro) only, (b) the external environment (meso and macro-environments including national, international; general, industry/market) only, and (c) both the internal and external environments.

Figure 1: Types of Cases



5.0 Deliverables & Expectations

As indicated in the course outline, each student is required to analyze one case study from the textbook and hand in a written report on the applicable due date. A schedule of all assigned/selected cases will be posted on cuLearn soon after the first session of the semester and will be updated accordingly as the need arises (or as the situation warrants). The case study report should be legible, type-written/word-processed in font size 12, double-spaced, well formatted with all margins of not less than 2.5cm, and properly paginated. The report should not exceed 6 pages in length. **N.B. Remember you are required to hand in a written report of your case study in both hard and soft copy versions (softcopy via cuLearn;) by the due dates (i.e., during the respective session a student is assigned). Please do not use the instructor's "MyCarletonOne" e-mail account to hand in your case report.** Moreover, it is the student's responsibility to check the Schedule on Case Study Allocations/Selections posted on cuLearn to ensure that the student hands in their case report on the specific due date. **N.B.:** Case study reports that are due on the week of the mid-term test (Session 6) may be handed in a week before (Session 5) if the student wishes to do so. This arrangement/choice/accommodation is accorded with the aim of minimizing the stress that some students may experience while preparing for the mid-term test. **N.B.:** ***Late Assignments will not be accepted for grading.***

Please consult the marking rubric posted on cuLearn before you hand in your case report. Doing so will assist you in further shedding light on the goals and expectations of this assignment. And, remember to attach a copy of the marking rubric to both the digital and hard copies of your report.

Due to time constraints, students will not be required to make an in-class oral presentation of their assigned case. That said, however, each student is expected to be able and prepared to discuss their case analysis/findings in class when and if the appropriate occasion arises (as it often does). Moreover, each and every student is expected during each session to have read all the relevant cases in the textbook as part and parcel of their preparations for each class regardless of whether or not a student is responsible for analyzing a particular case during the particular session.

6.0 Steps in Case Analysis & Instructions

It may sound trite/cliché to say that there is no one best way to analyze a business case. In fact, there are many suggestions out there on how to approach a case study in business studies. You are therefore encouraged to familiarize yourself with a variety of approaches to find which one best suits you and/or the case you are analyzing. Nonetheless, the following checklist is offered as a generic “common sense” approach that may be adapted to each individual case and personal idiosyncrasies.

(a) Do familiarize yourself with the case situation well by reading and re-reading the case as many times as you may feel the need to do so.

(b) Note/jot down salient issues you may identify in your readings of the case.

(c) Identify, define and analyze the main problem/issue of the case. Do not confuse symptoms with the problem. Use the questions provided at the end of each case to guide you on this.

(d) Carefully determine what principles, theories and/or models/frameworks could be appropriately and usefully/profitably applied. Apply the selected tools and techniques/frameworks e.g., PESTLE, Porter’s Five Forces Model, Porter’s Diamond, Value Chain Analysis, etc. to guide you in problem/issue identification and in determining the data/information you need for an effective case analysis and reporting.

(e) Find out the main causes of the issue/problem (and their implications for international business). Avail yourself of the pertinent/relevant theories bearing in mind their respective strengths and limitations.

(f) Write clear notes for yourself as you proceed.

(g) Synthesize your findings/analysis in a coherent analytical framework (e.g., SWOT, etc.).

(h) Read your case one more time to see if you have missed anything as your analysis may prompt you to search for more information on the case.

(i) To complement the information provided in the case you can make explicit, reasonable and defensible assumptions if need be.

(j) Prepare a draft of your written report. (Consult the suggested outline below to structure your report.)

(k) Make sure all tables, figures, charts, maps, etc. used in the case report are professionally presented with appropriate titles, legends/keys, and proper acknowledgement of sources of information or data.

(l) While the use of appendices is an important part of report writing you are advised to use them judiciously and appropriately. Of course, you are required to include all the appendices stipulated in this set of guidelines! Moreover, it is best to start each appendix on a fresh page. **Caution**: Please do not to use appendices as a means of circumventing the page limitation you may be confronted with because the tactic won't help you as: (a) you will end up placing very valuable material in the appendices instead of effectively using them in the main body of your report; and (b) in any case -- except for the mandatory attachments -- the page limit includes appendices; in other words the page count limit pertains to the whole report including the appendices in the report!

(m) All reports in this assignment must be properly formatted (e.g., double-spaced, except for long quotes; 12-point font size; top, bottom, left and right margins each being not less than 2.54 cm (1 inch); and, properly page-numbered.

(n) Revise your report and proofread it meticulously;

(o) It is important to remember that:

1. Language, presentation (including proof-reading and formatting), and professionalism are important.
2. Creativity and imagination are important and will be rewarded.

(p) Once you are done (and satisfied that you have done your best) print your final report and hand in (both hard- and soft copy) on time. Please ensure that the hard copy version of report has been carefully proofread before it is handed in. In other words, it is your responsibility to ensure that the printout of your hard copy is proofread and thus clearly legible and properly formatted and bound before you hand it in.

(q) A copy of the marking rubric must be attached to both the digital and hard copies of your case study report before you hand it in on the due date.

(r) For effective file management and tractability purposes please make sure the copy of your electronic file is named/labelled in such a way that it will indicate at least the following key pieces of information: (a) student name, and (b) brief title of the case study.

(s) Should you require assistance at any stage of the assignment, you are strongly urged to consult with the instructor for guidance.

As you may note, the above list does not include three important steps that are customarily undertaken in a typical full case analysis in strategic management; namely, (a) generating alternative solutions, (b) devising decision criteria for selecting the best option(s), and (c) formulating an action plan. The rationale for doing so (i.e., skipping those three steps) is provided in Subsection 7.3 below.

7.0 A Suggested Structure of the Written Report

The content of the written report will depend on the type of case under examination; i.e., it will depend on whether the case focuses on the internal, external or both environments. However, the format of written reports for all cases (regardless of type) will be the same (mutatis mutandis) as explained hereunder. Briefly, the case study report will comprise of at least three key parts/sections, viz.: (a) introduction, (b) analysis, and (c) synthesis/conclusion sections**.** We elaborate on each section below. To be sure, you are free to coin your own headings and sub-headings for the sections as deemed appropriate for the case being examined. As such, please do not feel bound/obliged to use the headings we offer below.

7.1 Introduction

Introduce the case by stating the key issue being examined in the case. Please do not rehash the case material here, but rather state what the case study is about; and briefly indicate how from your perspective the case study fits into the subject matter of this course. For instance, here you may indicate what environmental aspect the case is focusing upon and the issue/problem that is of the main concern. The questions at the end of each case study will guide you on this aspect.

7.2 Analysis

The type of case will by and large shape your analysis. If the case's focus is on the internal environment (micro-environment) then you will focus on the strengths and weaknesses/vulnerabilities of given organization(s). But if the case's focus is on the external environment, then, it goes without saying that's where your main focus should be too, i.e., you would mainly focus on the environmental opportunities and threats noted/uncovered in the case. In the same token, if the case requires you to focus on both the external and internal environments, then your main emphasis will be on both environments. In any case, the following are suggestions on what to focus in the analysis of the:

(a) Macro-Environment

If the case requires you to focus on the macro-environment (also referred to the general or external environment) your primary task here is to identify the opportunities and threats by paying particular attention on the relevant environmental segment(s) focused upon in the case (e.g., one or more of the PESTLE/STEEPLE segments). Most cases in the textbook pertaining to this category will focus on a segment of the PESTLE/STEEPLE (e.g., political, economic, or social sphere of the environment of international business). Some cases may pertain to how one segment of PESTLE/STEEPLE affects or has affected another segment of PESTLE/STEEPLE.

(b) Meso-Environment

If the case study requires you to focus on the meso-environment you will have to focus on the market/competitive environment, industry environment or both. For example, if the case's focus is on the "industry", then the five components of the Porter's Five Forces model is a tool of choice.

(c) Micro-Environment (Organizational)

If the case requires you to focus on the internal environment only your primary task here is to identify/analyze/discuss the strengths and weaknesses within the company/companies (if any) discussed in the case study and the key issue/problem facing the company/companies.

(d) Analytical Expectations in a Nutshell

In sum, if the case you are responsible for focuses on one of the above environments then you will accordingly tailor your analysis and written report on the focal environment and the key issue/problem at hand. In the event the case focuses on two or all the three layers of the environment of international business (i.e., micro-, meso-, and macro-environments), then your analysis should cover the relevant layers/aspects. In this case, you will identify the environmental forces/pressures (from two or all the three layers including the micro (organizational), market/industry at national, regional, global levels, and macro/general environments) that business actors/players are understood to be experiencing and their ramifications for international business in general or for focal organization's structure, strategy, performance, and managerial behaviour and practices in the context of the firm's internal environment (i.e., its strengths and weaknesses).

I would also like to reiterate that, as noted earlier, you are required to address all the questions raised in the case study by the authors. However, I would caution that you do not present your report as an answer sheet of the subject questions as one would have done in an exam/test situation whereby one would answer the given questions one by one. It is therefore best to let your answers to the questions "emerge" from your analysis/discussion of the case; i.e., weave your answers into your discussion. Of course, you are free to structure your "Analysis" section/segment of your report into subsections with each subsection dedicated to addressing a particular question or set of questions raised in the case study. In short, use the questions as "hints" on what is/are the important issues that need to be addressed in your case analysis. And, then proceed to address those issues effectively.

It is important, at this juncture, to emphasize that in your analysis, you need to pay special attention to the following aspects:

(a) **Current conditions (internally and/or externally) and forecasted trends** i.e., what are the prevailing situations/conditions and how is (are) the environmental layer(s)/segment(s) evolving; what are the causal factors and inter-linkages of the observed/predicted dynamics.

(b) **Effects of trends/conditions** i.e.: How are the influences of such dynamics affecting the focal company/organization, international business generally and/or society in general, as the case may be.

Attention to these aspects will invariably help you to explicitly and effectively address (respond to) the questions provided in the textbook at the end of each case study. Moreover, it is important to emphasize that in “real” life business managers always will have (and have had) to contend with incomplete/scant information and ambiguous situations as the cost of searching for (and analysis of) more information is often very prohibitive and may in fact impair timely decision making not to mention that uncertainty is a key characteristic of the environment of international business. Thus, as is always the case, one can never have enough information. In lieu of complete information, you are therefore urged, for the purposes of conducting an adequate case analysis, to make explicit, reasonable and defensible assumptions.

7.3 Synthesis & Conclusions

Based on your analysis of the case situation, you are here required to synthesize your findings into a coherent narrative about the observed conditions/trends. Specifically, depending on the type of case, you will either highlight the opportunities and threats/challenges that are being encountered in the given environment and/or the strengths and weaknesses of the subject organization(s) (or society, as the case may be) and then infer the implications of the observed trends/conditions for the given firm or for international business generally. A SWOT analysis is here best suited as a summary presentation framework especially for a case that focuses on both the external and internal environments.

A word of caution is in order here. Unless you are specifically required (e.g., through the textbook-based case study questions), you are not required for the purposes of this course to outline any strategic options and course(s) of action or formulate and recommend an implementation plan for a given firm as would have been required in a Strategic Management course. Tempting, as it may be to do so, always remember, our primary focus in this course is to study and effectively understand the “environment” of international business per se not to do both tasks i.e., analyze the environment and devise a strategic plan. As such our **primary** task is to analyze the environment in all its incarnations. What can be done about the information/knowledge about the current/predicted/forecasted environmental conditions/trends one may have uncovered in the case (i.e., the need to propose a course of action and formulate an implementation plan for the purposes of ensuring/realizing a strategic fit between the environment and organizational mission and goals) is **secondary** here even though it may be the *raison d'etre* of studying the particular environment of international business in the first place. In other words, you are free to come up with recommendations (especially if that is what you are asked to do in the textbook-based questions), but that is not of a high priority here.

For those who haven't yet taken a course in Strategic Management, we hope you will get that chance to devise strategic plans when you take the course. For now let's perfect our skills in environmental analysis first. In short, all you are required for this course, is to provide a clear/crisp analysis/synthesis of the case study that is good enough to yield valuable insights that can then be used in the generation of alternative courses of action or in the formulation of a strategic action/implementation plan. A good grasp of the skills garnered in this course may even help you in your Strategic Management course (and other courses too) later on.

7.4 Academic Integrity

You must provide a list of references and citations as required for all the material/resources you may have utilized. Select a style of referencing you are familiar with (e.g., APA, MLA, Harvard, Chicago, etc) and abide by it. **Remember, Carleton University rules on plagiarism will be fully enforced**. If in doubt please consult the University Calendar and/or Carleton University's Academic Integrity Policy at:

http://www1.carleton.ca/studentaffairs/academic-integrity/

Further complementary resources can also be found at Carleton Library's resources on how to avoid plagiarism: http://www.library.carleton.ca/help/avoid-plagiarism and on how to cite your sources: http://www.library.carleton.ca/help/citing-your-sources.

Suffice to note here that you must acknowledge all sources of the materials (ideas, figures, tables, maps, etc.) you have used in your report. To effectively accomplish this you must first select a referencing style (e.g., APA, Chicago, Harvard, MLA, etc.) for your project. **This must be**

declared/indicated on Appendix A below. You are free to use footnotes, endnotes or in-text notes as per the referencing style you have adopted. Also make sure you have a properly prepared References/Bibliography/Works Cited section of your report. Please do not mix an Endnotes section with the References/Bibliography/Works Cited because the two are not one and the same nor are they substitutable. The main library web site has a number of resources you can consult with regard to proper citations and referencing. (See http://www.library.carleton.ca/howdoI/citing.html.)

7.5 Attachments

You must attach a duly filled and signed form of "Declaration of Academic Integrity" with your report (see Appendix A below). **You must indicate the *referencing style you have adopted in this assignment.*** You may also attach material (i.e., appendices) that you deem important to include in your report. Remember, do not employ the attachments/appendices as way to circumvent the page limitations imposed in the requirements. Except for the Declaration of Academic Integrity form, all appendices will be counted within the 6 page limit.
N.B.: A copy of the marking rubric must be attached to both the digital and hard copies of your case study report before you hand it in.

8.0 Conclusions

In this set of guidelines I have endeavored to provide you with some guidance on how to undertake and successfully complete your individual case study assignment you are required to fulfill in this course. I hope you have found them useful. Your suggestions to improve this guide will be gratefully appreciated.

All the Best!

Appendix A

(must be placed as an appendix of your report)

Declaration of Academic Integrity

BUSI 3704 A: The Environment of International Business

Fall 2019

Individual Case Study

The University Senate defines plagiarism in the regulations on instructional offences as: "to use and pass off as one's own idea or product work of another without expressly giving credit to another."

Borrowing someone else's answers, unauthorized possession of tests or answers to tests, or possession of material designed in answering exam questions, are also subject to university policy regarding instructional offences.

Photocopying substantial portions of a textbook (e.g. more than 1 chapter or 15% of the total page count) without the publisher's permission is another misuse of intellectual property, and is also a violation of Canadian copyright law. Access Canada's web site provides guidelines on legitimate copying.

I declare that the work submitted herewith is my work. All sources have been referenced in the footnotes, endnotes or bibliography. This work has not been shared with anyone.

Please indicate here the referencing style you have adopted (e.g., APA, MLA, etc.):…………………………….

Do not forge signatures.

Student Name & Student ID	**Signature of student** The student must sign to receive a grade
…………………………………………………	…………………………

Due Date……………………………………………………………………

Date and hour received, if late…………………………………………….

Penalty for delay, if applicable …………………………………………….

Instructional offence cases must be referred to the Associate Dean (Undergraduate Studies); individual solutions are not permitted.